

# *Annual Reconciliation User Guide*

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(City Login) User Documentation



Kentucky Department of Insurance  
January 2010  
User Documentation  
*Version 3.0*

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## SETTING UP A NEW ACCOUNT

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If you are a city representative wishing to view your city specific LGPT data, you will need to set this account up manually. To do so either:

- Submit an e-mail to the following e-mail address:

[DOI.ISHelpDesk@ky.gov](mailto:DOI.ISHelpDesk@ky.gov)

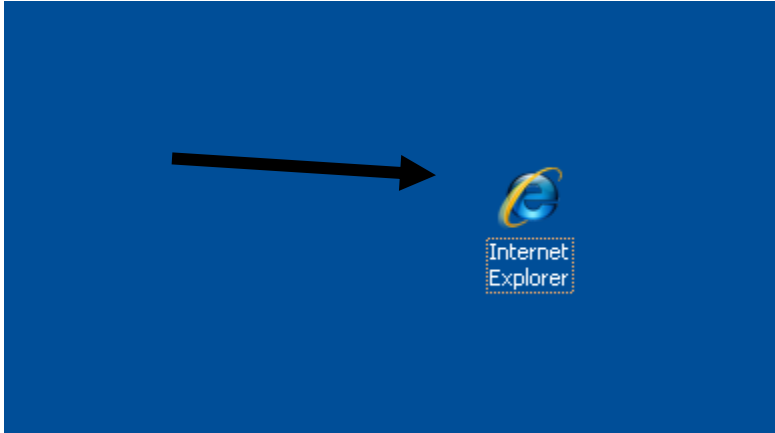
- Or, you may call the DOI regarding this topic at 502-564-6154 X4359.

## LOGGING INTO E-SERVICES

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After acquiring your username and password from the DOI, follow these steps to log into E-Services.

Double click on the **Explorer icon** on your desktop. The icon is shown below.



Proceed to the Kentucky DOI webpage at:

<https://insurance.ky.gov/kentucky/>

The following page should appear.

**KY Department of Insurance**  
An agency within the Public Protection Cabinet

Location: 215 W. Main St. Frankfort, Kentucky 40601 | [Mailing Address Information] | [Directions] | (800) 595-6053 | TTY (800) 462-2081

**CONSUMER PROTECTION & EDUCATION**

- Free Publications
- Insurance Consumer Page
- Complaint Ratio Search
- File a formal complaint online
- "Clean Claims" Form
- Publicaciones en Español
- Filing a consumer complaint [form & instructions]
- Event Calendar

**AGENT LICENSING**

- Licensee Procedures, Forms and Information
- Agent/Agency Search
- eServices - Online Services / Information (Password Required)
- Insurance Licensee Page
- CE & Pre-licensing Providers, Courses, and Failure to Comply with CE

**COMPANY INFORMATION**

- Search for a Company
- Insurance Company Page
- Rate and Form Filings
- Financial Standards and Examination
- Local Government Premium Tax
- Annual Statement Filing Checklists and Instructions
- Captive Insurance Company Licensing and Regulation

**CARE**

- Salary calculation/employees
- Application
- Application instructions
- Application tips
- Fact sheet

**Our Mission Statement:** We promote sound, competitive insurance markets; protect the public through effective enforcement and regulation; and empower the public through outreach and education.

**INFORMATION Search**

Select Search Option

**What's New**

- Insurance Legislation Adopted by the 2008 Kentucky General Assembly (Regular Session) (08/08/2008)
- Texas DOI Press Release: Lincoln Memorial Action (07/31/2008)
- Whitley City Woman Charged With Fraud (07/31/2008)
- Georgetown Man Charged With Insurance Fraud (07/31/2008)
- Military Sales Practices: Reporting of Disciplinary Actions (07/21/2008)
- Louisville Business Owner Indicted By Grand Jury (07/17/2008)

Click the E-Services icon in the top right corner of the webpage.

**eServices**  
Click here

[Directions] (800) 595-6053 | TTY (800) 462-2081

**Our Mission Statement:** We promote sound, competitive insurance markets; protect the public through effective enforcement and regulation; and empower the public through outreach and education.

**INFORMATION Search**

Select Search Option

rd Required)  
to Comply

Which will direct you to the DOI e-services portal, as shown below.

**KY**Department of Insurance

[KYOI Home](#) | [FAQs](#) | [Contact Us](#)

Please log in here:

Username

Password

**First time here? Please click here to register for secure access.**

**Forgot your password?**

Having trouble logging in? Click here for assistance.

[Click Here](#) to learn about our security.

## What does eServices offer?

- Consumers**
  - Submit Consumer Complaint File
  - View data related to ratios (i.e., Complaint, Medicare Supplement, Consumer Guides) - \*\*
  - Find information related to a licensed Insurer, Individual or Business Entity - \*\*
- New Applicants - \*\***  
(Paperwork not submitted yet)
  - Access to applications, study guides, instructions and documents
- Individuals**  
(Licensed or pending applicants)
  - Review your licensing information and account profile
- Business Entities**
  - Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
  - Submit requests for additional licenses, clearance / certification letters, voluntary surrenders, address changes, name changes, license renewals, and designations. \*\*
- Insurers**
  - Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
  - Renew appointments and submit payments **(Instructions) - New**
  - Submit financial responsibility requests \*\*

## KY Department of Insurance

Enter the  
username  
and  
password  
here...

Please log in here:

Username

Password

[First time here? Please click here to register for secure access.](#)

[Forgot your password?](#)

[Having trouble](#)

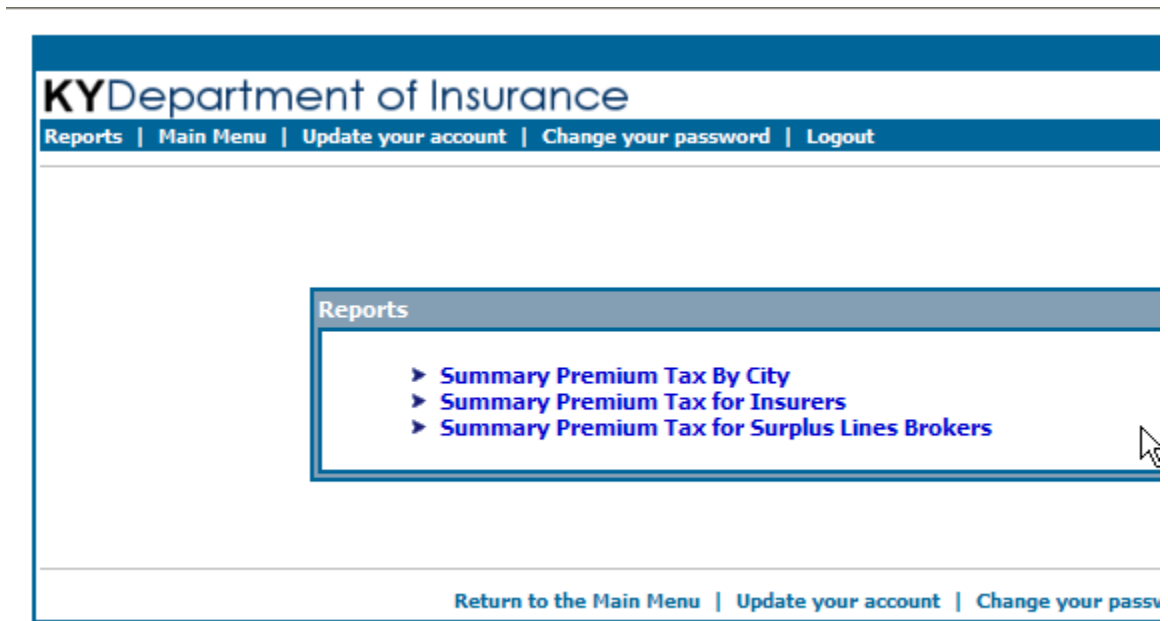
Please log in here:

Username

Password

Then click  
'Submit'

The following screen should display...





# ACCESSING ANNUAL RECONCILIATION DATA FROM E-SERVICES

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This account is set up for city/county taxing governments to see their data online via E-Services.

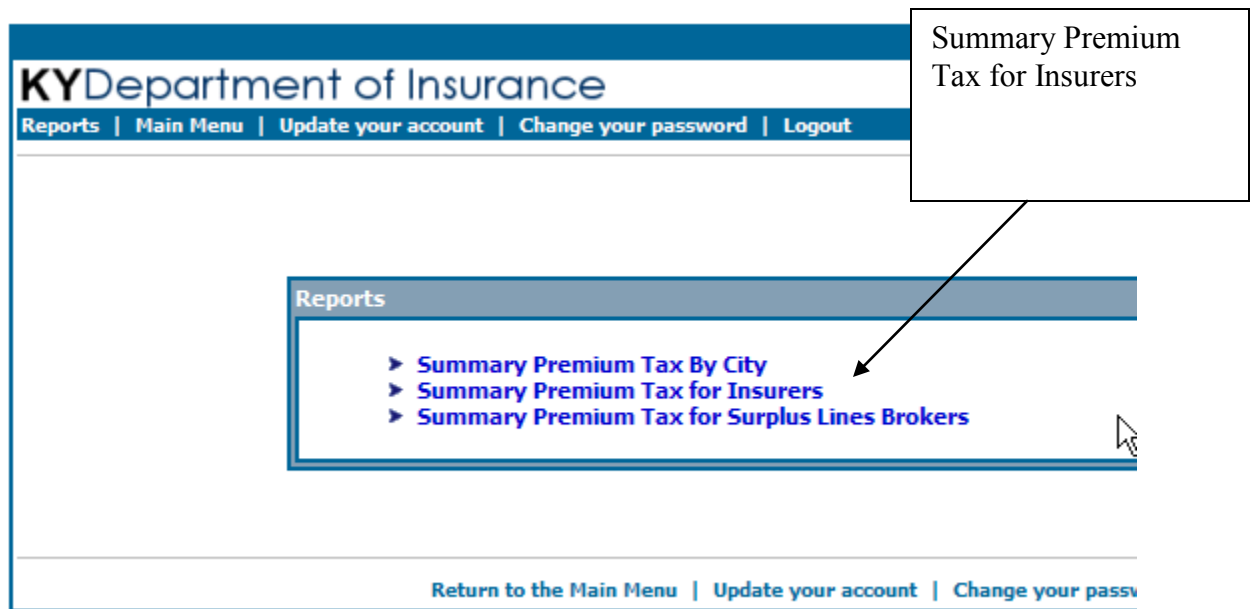
It is important to note the user will have access to only the specific city data for whom the account was set up.

After acquiring the login from the DOI, you may access the data by choosing:

## **Summary Premium Tax for Insurers**

The Summary Premium Tax for Insurers Report will list all Companies that have written business in your city, along with Premium Amounts, Taxing Amounts, and any interest paid. This report is sorted by year, and is exportable via Excel.

To access this report, click:



Select the year you wish to review, then click “Submit”...


## Annual Reconciliation Report

Tax Year

The data will display..

Note: You may download the data to an Excel spreadsheet by clicking this icon

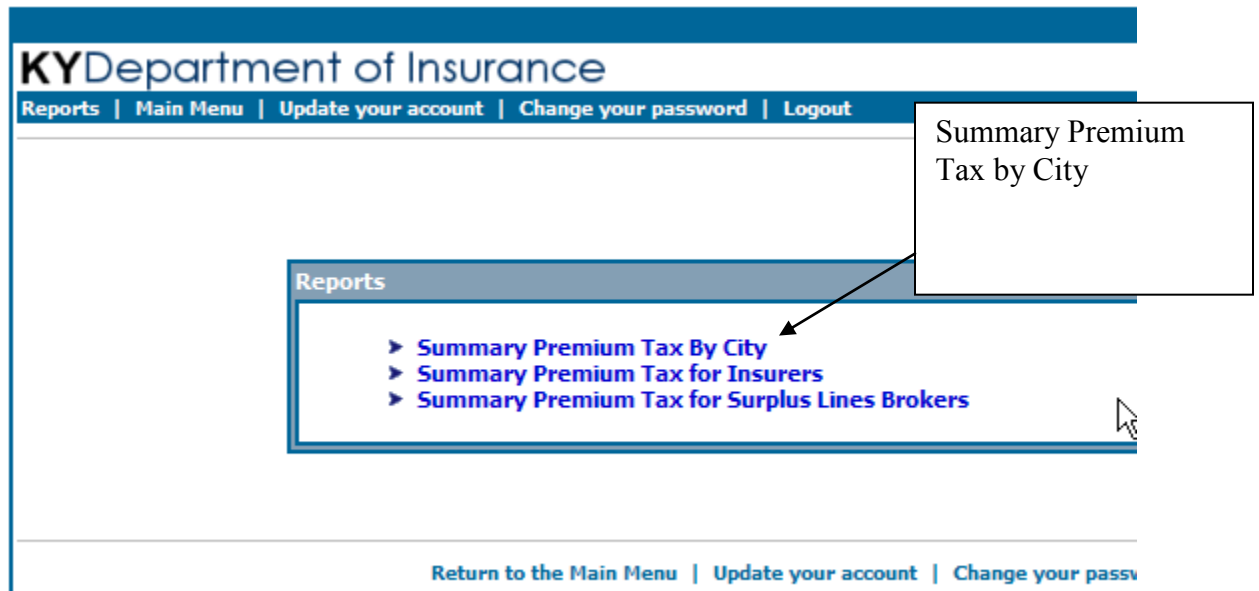
**KY Department of Insurance**  
[Reports](#) | [Main Menu](#) | [Update your account](#) | [Change your password](#) | [Logout](#)

**Summary Premium Tax for Insurers**  
 Tax Year   

City Name :Bowling Green	Tax Year :2008			
Insurer	FEIN/DOIID	Recorded Premium	Recorded Taxes	Annual Interest
AAA Life Insurance Company	52-0891929	\$15,262.00	\$305.00	
ACA Insurance Company	91-1874022	\$192.00	\$5.00	
ACE American Insurance Company	95-2371728	\$1,059,639.28	\$30,351.13	
ACE Fire Underwriters Insurance Company	06-6032187	\$137,172.48	\$9,600.41	
ACE Property and Casualty Insurance Company	06-0237820	\$7,729.70	\$165.51	
ACUITY, A Mutual Insurance Company	39-0491540	\$333,314.29	\$15,737.00	
AETNA Insurance Company of Connecticut	06-1286276	\$1,389.00	\$28.00	
AF&L Insurance Company	23-2401229	\$19,310.30	\$386.21	
AIG Indemnity Insurance Company	13-1967524	\$4,422.00	\$90.00	
AIG Life Insurance Company	25-1118523	\$1,826.77	\$44.35	
AIG National Insurance Company	13-3801089	\$53,962.00	\$1,080.00	
AIG Premier Insurance Company	22-1721971	\$153.00	\$5.00	
AXA Insurance Company	13-3594502	\$1,282.00	\$90.00	

## Summary Premium Tax By City

This report will compare previous annual data concerning the taxing entity.



Click “Summary Premium Tax by City” ....the results display..

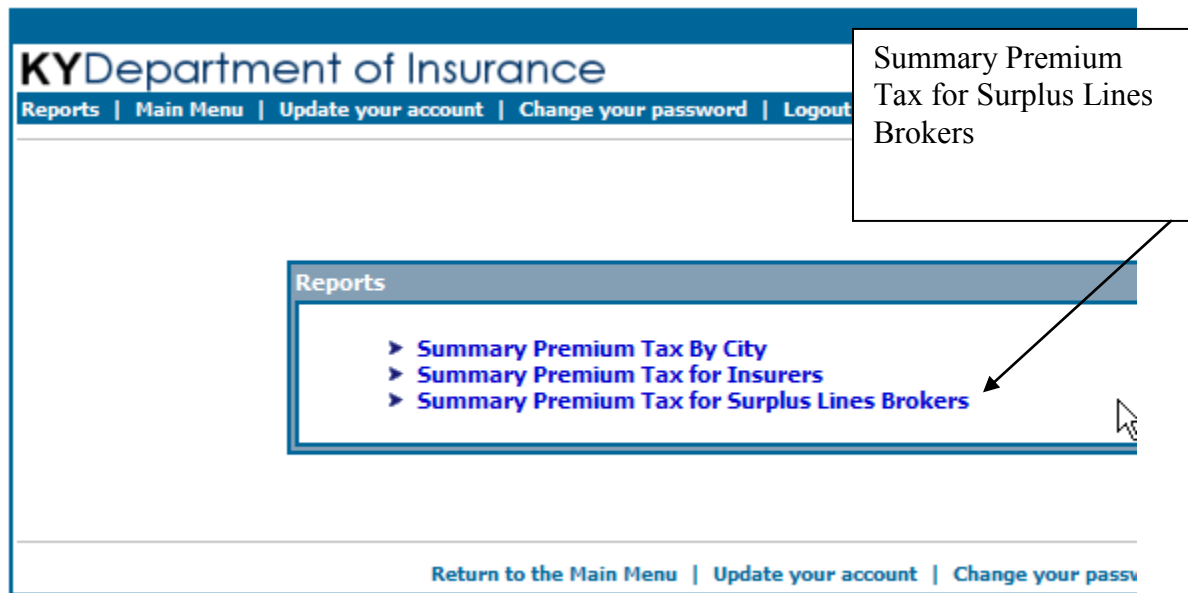
## Summary Premium Tax by City

City Name	Bowling Green	
Year	Annual Premium	Annual Tax Paid
2005	\$91,556,934.08	\$2,947,636.27
2006	\$99,292,003.73	\$3,058,077.01
2007	\$96,686,157.34	\$4,403,135.00

## Summary Premium Tax for Brokers

The Summary Premium Tax for Surplus Lines Brokers Report will list all Brokers that have written business in your city, along with Premium Amounts, Taxing Amounts, and any interest paid. This report is sorted by year, and is exportable via Excel.

To access this report, click:




Select the year you wish to review, then click “Submit”...

The screenshot shows the "Annual Reconciliation Report" form. It has a title "Annual Reconciliation Report" in bold. Below the title, there is a "Tax Year" label, a dropdown menu showing "2006", and a "Submit" button. An arrow points from the text "Select the year you wish to review, then click “Submit”..." to the "Submit" button.

The data will display..

**KY Department of Insurance**  
Reports | Main Menu | Update your account | Change your password | Log out

**Summary Premium Tax for Surplus Lines Brokers**

Tax Year:   

Note: You may download the data to an Excel spreadsheet by clicking this icon

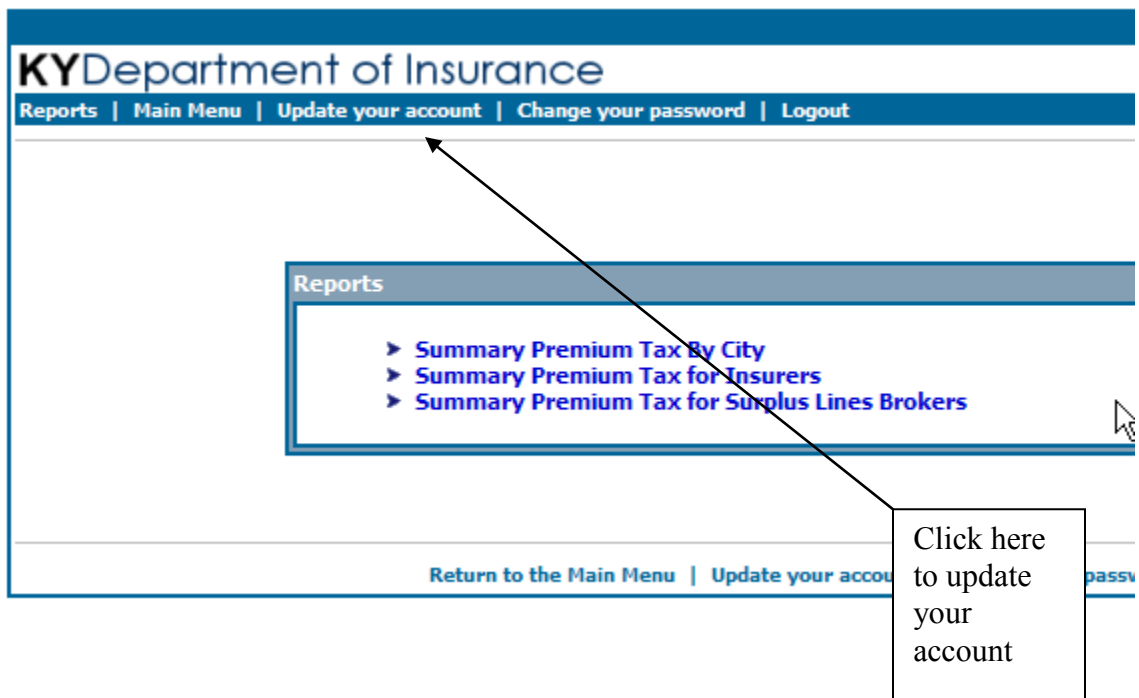
City Name :Bowling Green	Tax Year :2006	
Name	Recorded Premium	Recorded Taxes
Alexander Clark Cameron	\$8,325.00	\$300.96
Alison Joy Renner	\$-382.00	\$-7.64
Bruce Wayne Ferguson	\$6,136.57	\$429.56
Charles Minor Moore	\$5,561.00	\$111.22
Christiaan Lance Volkert	\$148,578.00	\$3,200.61
Christopher Bernard McGovern	\$31,322.63	\$655.10
Davis Donald Moore	\$8,600.00	\$172.00
Don Chris Keen	\$3,000.00	\$60.00
Donald A Alberico	\$35.65	\$2.50

# ACCOUNT MAINTENANCE

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There are tools in the account that allow you to update your information, or change your password.

## Updating Your Account



**Update Account Information**

Update Account Information - updates eServices account information only.

Updating your address on this profile does not update your official record with the department. You must complete "Record Correction Form 8303" on the eServices menu.

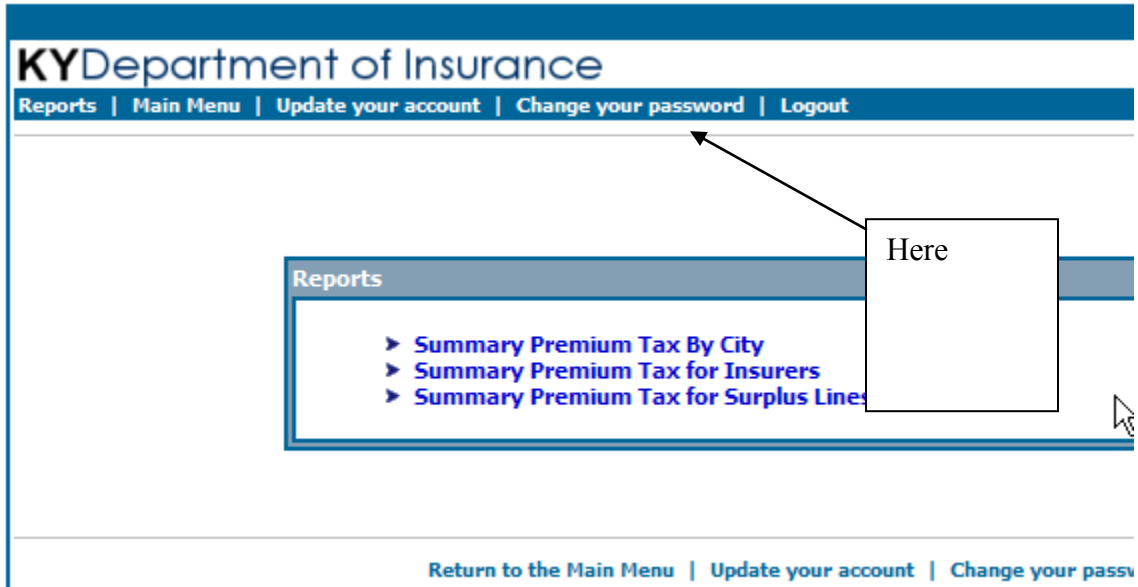
User Name	Annrec2009	
Password	***** (To change your password, <a href="#">Click here</a> )	
First Name	<input type="text" value="V"/>	
Middle Name	<input type="text"/>	
Suffix Name	<input type="text"/>	
Last Name	<input type="text" value="A"/>	(DO NOT ADD SUFFIX: JR, SR, etc)
Phone	<input type="text"/>	Extn <input type="text"/> (Numbers Only)
Email	<input type="text" value="pa.ada@ky.gov"/>	
	(include the .com, .net or .org - accounts with invalid e-mail addresses will be removed)	
Address Line 1	<input type="text" value="215 West Main St."/>	
Address Line 2	<input type="text"/>	
City	<input type="text" value="Frankfort"/>	
State	<input type="text" value="KY"/>	Zip <input type="text" value="40601"/>
Security Question	<input type="text" value="Your Mother's Maiden Name"/>	
Answer	<input type="text" value="lllll"/>	

Make any changes to the data here...

Then click 'Update Account' here to finalize the changes.

## Changing Your Password

Click here, to change your password.



**KY Department of Insurance**

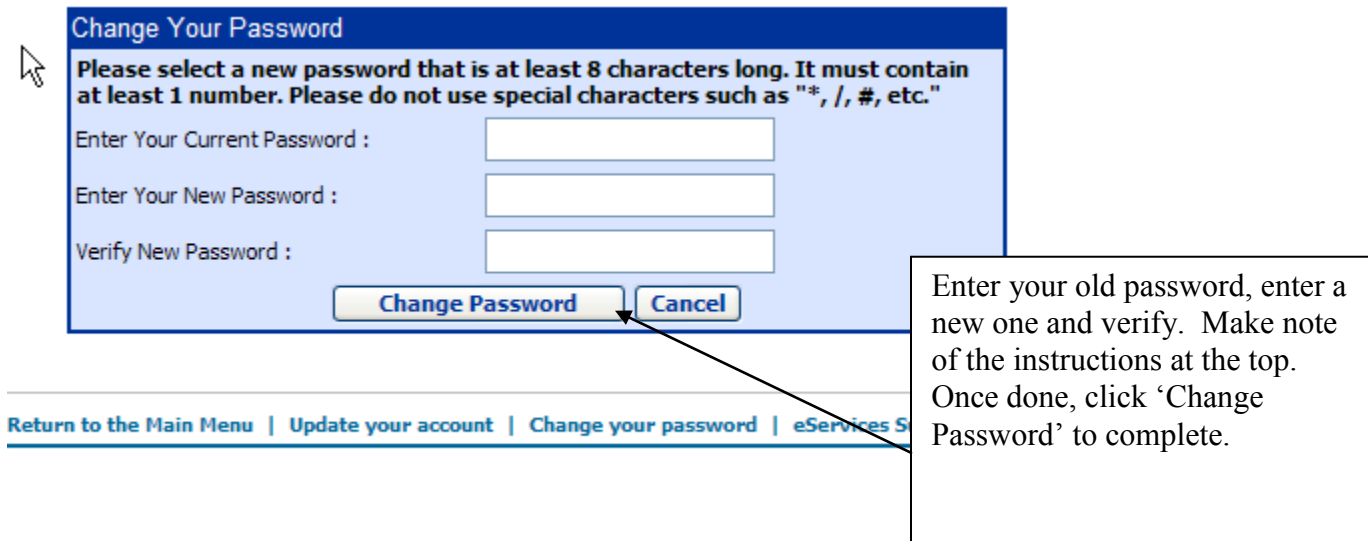
[Reports](#) | [Main Menu](#) | [Update your account](#) | [Change your password](#) | [Logout](#)

**Reports**

- [Summary Premium Tax By City](#)
- [Summary Premium Tax for Insurers](#)
- [Summary Premium Tax for Surplus Lines](#)

[Return to the Main Menu](#) | [Update your account](#) | [Change your password](#)

A callout box labeled "Here" with an arrow pointing to the "Change your password" link in the top navigation bar.



**Change Your Password**

**Please select a new password that is at least 8 characters long. It must contain at least 1 number. Please do not use special characters such as "\*", /, #, etc."**

Enter Your Current Password :

Enter Your New Password :

Verify New Password :

[Return to the Main Menu](#) | [Update your account](#) | [Change your password](#) | [eServices S](#)

A callout box with instructions: "Enter your old password, enter a new one and verify. Make note of the instructions at the top. Once done, click 'Change Password' to complete." with an arrow pointing to the "Change Password" button.